



Montana Teachers' Retirement System
Policy 3-0100-001
Electronic Authorization and Signing of Correspondence From TRS

Section: Administrative

Implementer: Authorized TRS Staff

Effective Date: February 21, 2014

Purpose:

This policy allows the use of electronic authorization and signing of correspondence from TRS staff to members, benefit recipients, employers, and other individuals and entities with whom TRS communicates in the regular conduct of TRS business. The use of electronic authorization and signatures is intended to streamline the overall process for creating, sending, and maintaining official correspondence by allowing TRS staff members who create official correspondence to electronically authorize the final content of an official correspondence and forward the correspondence in electronic format to a centralized correspondence manager to be finalized, printed, mailed, and filed, without having to be returned to the correspondence originator for signing. The electronic facsimile signature of the TRS staff member who created the correspondence will be electronically inserted in the correspondence.

Definitions:

As used in this policy, “correspondence” means routine correspondence originating in the TRS pension administration system’s correspondence module, frequently referred to as the “auto letter” module.

Policy:

1. TRS shall establish a process to reduce the administrative effort and cost related to creating, finalizing, mailing and electronic filing of official TRS correspondence by identifying a TRS staff position or positions (“correspondence manager”) to complete the finalization, signing, mailing, and filing of correspondence, without returning the final correspondence to the TRS staff member who originally created or generated the correspondence (“correspondence originator”) for signing.
2. After drafting, reviewing and making any necessary revisions to a particular item of correspondence, the correspondence originator will electronically send a final draft (“authorized draft”) of the correspondence to the correspondence manager for finalization, printing, mailing and electronic filing.
3. The authorized draft of the correspondence will be electronically marked by the TRS correspondence system to maintain the identity and insert the facsimile signature of the correspondence originator.
4. In finalizing the correspondence, the correspondence manager may revise formatting and typeface, correct typographical errors, append enclosures designated in the authorized

draft, insert templates, macros, or commands to apply TRS letterhead or otherwise conform the correspondence's appearance to TRS standards, and make such other non-substantive additions, deletions and changes as are necessary to generate the final correspondence for printing, mailing, and electronic filing.

5. If a substantive change to the correspondence is determined to be necessary after the authorized draft is sent to the correspondence manager, the revised correspondence must be reviewed and again approved by the correspondence originator prior to finalization, printing, mailing, and electronic filing of the correspondence.
6. The electronic facsimile signature of the correspondence originator will appear on the electronic copy maintained in the files of TRS, and will appear on any print made from the electronic file copy.
7. The electronic facsimile signature will appear on the original hard copy printed and mailed to the member, benefit recipient, employer, or other person or entity who is a recipient of the correspondence.
8. The electronic facsimile signature will have the same legal effect as an original signature of the correspondence originator.

Cross Reference:

None

Signature:

By board action taken on (date) February 21, 2014, and by my signature below, the TRS board has authorized implementation of this original or modified policy. The effective date of this policy is:

X the date of board action set forth above

_____ (date) _____.

BY: Scott Dubbs, Acting Chair

/s/ Scott A. Dubbs

Signature

TRS policies may be amended or revoked from time to time, effective from the date of board action or later date as specified in the policy. The official version of any TRS policy is the version currently posted on the [TRS Board Policies webpage](#) and deviation will be resolved in favor of the official version. Please review the material online prior to placing reliance on printed or archived versions.